Direct Billing Services - Online Bill Access

User Guide – Draft

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Direct Billing Services –
Online Bill Access

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I. Direct Billing Services - Online Bill Access Introduction

A. Overview Of Application:

VITA will bill in-scope agencies for direct costs of IT Goods & Services and IT Payroll Services provided. Each agency's bill is based on payments made by VITA towards IT Goods & Services procured and costs incurred for IT Payroll Services for a particular Agency.

VITA Direct Billing Services application uses the procurement data entered by the Agency in eVa, Virginia's statewide e-procurement application and the payroll data from CIPPS, Statewide Payroll and Leave System to prepare the data required for "VITA Direct Billing Services Bill". This data will be used to generate the VITA Direct Billing Services IAT, the IT Goods & Services Invoice Detail Report and the IT Payroll Invoice Detail Report.

VITA Customers and Agencies can access VITA Direct Billing Services IAT and Invoice Detail Reports online through the Direct Billing Services - Online Bill Access Application.

B. Description:

Direct Billing Services - Online Bill Access Application is an internet application which can be accessed by VITA customer billing contacts and other designated personnel to view, download VITA Direct Billing Services IAT and Invoice Detail Reports.

Starting with the July-04 Billing period, VITA Direct Billing Services (IAT) Bill and Invoice Detail Reports will be available online for the customers to access. The following will be available:

1. VITA Direct Billing services (IAT) Bill

2. IT Goods and Services Invoice Report

3. IT Payroll Invoice Report

VITA Direct Billing Services (IAT) Bill will be available in Adobe PDF (.pdf) format.

IT Goods and Services Invoice Detail Report and IT Payroll Invoice Detail Report will be available in Adobe PDF (.pdf) format and in Comma Delimited (.csv) format.

C. Application Functionality:

Direct Billing Services - Online Bill Access Application is an internet application which can be accessed by VITA customer billing contacts and other designated personnel to view, download VITA Direct Billing Services IAT and Invoice Detail Reports.

Depending on the access privileges granted to the user Direct Billing Services - Online Bill Access Application provides the following functionality:

1. Pegasus based user access (Secured Access)

2. Role based user privileges (Access to single or multiple agency / customer information).

3. Direct Billing Services IAT and Invoice Detail Reports, online presentation to agencies / customers.

4. Search for Bills (Direct Bill IAT's and Invoice Detail Reports)

5. View and Sort Search Results.

6. View and Download Direct Bill IAT and Invoice Detail Reports.

7. Online instructions, online help resources, and links to other useful resources.

Direct Billing Services - Online Bill Access Application consists of the following screens:

1. Log In

2. Bill Browser

3. Help

4. Log Off

II. How to Access Direct Billing Services - Online Bill Access Application

A. Business Overview Of Access

Access to Direct Billing Services - Online Bill Access application is controlled and is based on the user access privileges. There are several different types of access.

Depending upon user role, access is provided to:

1. Single Agency or Multiple Agency or All agencies

2. Access to Direct Bill IAT and Invoice detail reports in Adobe PDF (.pdf) format

3. Access to Invoice detail reports in Comma Delimited (.csv) format

Role based user privileges

User access to agency information, VITA Direct Services Bills (IAT) and Invoice Detail Reports is controlled and is based on the user role. User role and access privileges are as follows:

1. Access to agency / customer information.

   a. User with access to single agency will be able to access only bills of the agency for which they have been given access.

   b. User with access to multiple agencies will be able to access bills of all the agencies for which they have been given access. User can view one agency data at a time and have the following options to select from:

       i. Option to display agency/customer list by name or by number.

       ii. Dropdown box with list of agencies / customers for which user is given access.

2. View and Download Direct Billing Services IAT and Invoice Detail Reports.

   Bill Receivers will have access to the following:

       i. View and Download Direct Billing Services IAT's in Adobe PDF (.pdf) format.

       ii. View and Download Invoice Detail Reports in Adobe PDF (.pdf) format and Comma Delimited (.csv) format.

    a. Bill Reviewers will have access to only Adobe PDF (.pdf) files.

        i. View and Download Direct Billing Services IAT's in Adobe PDF (.pdf) format.

        ii. View and Download Invoice Detail Reports in Adobe PDF (.pdf) format.

        iii. Invoice Detail Reports in Comma Delimited (.csv) format are not available.

    b. Administrative Role (for example: VITA Billing Staff)

        iii. Access to all agencies.

        iv. View and Download Direct Billing Services IAT's in Adobe PDF (.pdf) format.

        v. View and Download Invoice Detail Reports in Adobe PDF (.pdf) format and Comma Delimited (.csv) format.

B. Log On Procedure, How To Get Access:

Accessing the Direct Billing Services - Online Bill Access Application

A VITA Pegasus Account is required to access the Direct Billing Services - Online Bill Access Application. Once a VITA Pegasus Account has been established, and access to the Direct Billing Services - Online Bill Access Application has been granted, you are able to log into the Direct Billing Services - Online Bill Access Application with your VITA Pegasus Account user ID and password.

The steps below will guide you through the process for establishing your VITA Pegasus Account, receiving access to the Direct Billing Services - Online Bill Access Application, and logging into the Direct Billing Services - Online Bill Access Application. Screen shots have been included to assist in the clarification of the instructions.

The Direct Billing Services - Online Bill Access Application login page can be found at the following URL:
http://www.vita.virginia.gov/services/busServe/onlineBilling.cfm

C. VITA Pegasus Account

The Direct Billing Services - Online Bill Access Application Login Page provides options which allow the user to access the VITA Pegasus Account Application. The VITA Pegasus Account Application was developed to manage the growing number of VITA user accounts and application privileges.

The VITA Pegasus account provides a single user name and password for use across all VITA Web-based applications. However, individual application permissions must be obtained for each VITA Web Application being accessed. The VITA Pegasus Account Application provides the following user-friendly enhancements:

- Account owners are able to submit answers to predefined, secret security questions that can be used to reset passwords without contacting the VITA Customer Care Center (VCCC).

- Account owners receive a reminder when their account password is nearing its expiration.

- Account owners are able to maintain their own contact information.

Each link is defined below:

a) Request a VITA Pegasus Account

This option is to request a new VITA Pegasus Account only. If you already have a VITA Pegasus Account, do not use this option. If you do not have a VITA Pegasus Account, you may submit your request from here. Upon selecting this link you are directed to the VITA Pegasus New User Account page (see screen below).

- Step 1:

    Select the **Request a VITA Pegasus Account** link from the Direct Billing Services - Online Bill Access Application Login Page.

    You are directed to the VITA Pegasus Account page for the Direct Billing Services - Online Bill Access Application. See screen shot below:

- Step 2:

  Select the "New Users" option and click on "Continue"

  You are directed to the "New User Account Page". Here you will need to supply basic information such as your name, e-mail address, create a password, and answer two secret security questions. Please note, when creating a password, you must adhere to the following criteria:

  - Passwords must be between 9 and 14 characters in length.

  - Passwords must contain at least 3 of the following 4 types of characters.

    - lowercase alpha [e.g., abc]

    - uppercase alpha [e.g., ABC]

    - numerical [e.g., 123]

    - special [e.g., !@#]

  - Passwords cannot contain your user name or any part of your full name.

  - Passwords used previously will not be accepted.

  - Passwords will expire in 90 days.

New User Account

Changing your user information:

You can change your user information at any time by visiting the Pegasus Profile Manager and selecting the "Update Profile" option. Keeping your user information updated will ensure that you are kept up-to-date with the latest information regarding your **VITA Pegasus Account** and the **Direct Billing Services-Online Bill Access** site.

*The contact information on this page must be correct in order to receive further instructions on accessing the **Direct Billing Services-Online Bill Access** site.*

First Name   **M.I.**   **Last Name**

Telephone xxx-xxx-xxxx **Ext.**   **Organization**

Email   **Confirm Email**

Password Policy:

1. Passwords must be between 9 and 14 characters in length
2. Passwords must contain at least 3 of the following 4 types of characters
   - lowercase alpha [**e.g.** *abc*]
   - uppercase alpha [**e.g.** *ABC*]
   - numerical [**e.g.** *123*]
   - special [**e.g.** *!@#*]
3. Passwords cannot contain your user name or any part of your full name
4. Passwords will expire in 90 days after your account information has been mailed to you.

Password   **Confirm Password**

Changing your password:

You can change your password at any time by visiting the **Pegasus Profile Manager** and selecting the "Change Password" option. If you forget your current password, you can create a new password by answering Secret questions to validate your identity. **Pegasus Profile Manager** will display your Secret questions - you will need to provide the correct answers. Choose questions and answers that are easy for you to remember but difficult for others to guess.

A link to the **Pegasus Profile Manager** will be emailed to you upon approval of your request.

Choose Secret Question #1

What is the last name of your favorite teacher
What is your best friend's middle name
What is the name of the street where you grew up
What is the name of the city/town that you were born in
What is the Make and Model of your first car

Enter the Answer to Secret Question #1

Choose Secret Question #2

What year did you graduate from college
What year did you get married
What year did you start school
What year did you start your first job
What year was your first child born

Enter the Answer to Secret Question #2

Cancel   Continue

- Step 3:

  Select the "Continue" button in order to submit your request for a VITA Pegasus Account.

  You are contacted with your new VITA Pegasus user ID once your account has been activated. By submitting your request from this location, your VITA Pegasus Account will automatically provide access to the Direct Billing Services - Online Bill Access Application.

b) Request Access for an existing VITA Pegasus Account

This option is for users who already have a VITA Pegasus Account, but do not yet have access to the Direct Billing Services - Online Bill Access Application. You will need to login to your existing VITA Pegasus Account and Confirm/Update your user account information. By accessing your VITA Pegasus Account from this location, your VITA Pegasus Account will automatically provide access to the Direct Billing Services - Online Bill Access Application.

- Step 1:

  Select the **Request Access for an existing VITA Pegasus Account** link from the Direct Billing Services - Online Bill Access Application Login Page.

  You are directed to the VITA Pegasus Account page for the Direct Billing Services - Online Bill Access Application. See screen shot below:

- Step 2:

  Select the "Existing Users" option and click the "Continue" button. A window will pop-up requesting your Pegasus user name and password.

- Step 3:

  Enter your Pegasus user name and password and click on "OK". This will log you into the VITA Pegasus Account Management Application.

  After completing the login, you are directed to the "Confirm/Update User Account Information" page.

  If you receive a message that states, "There is missing or invalid information in your VITA Pegasus Account profile. Please update your user information before changing your password," this is normal and expected. It simply means that you have not completed the process for requesting access to the Direct Billing Services - Online Bill Access Application.

- Step 4:

  Confirm your information is complete and accurate, enter your e-mail address in the "Confirm Email" field, and click the "Submit" button.

  You are contacted via e-mail once your VITA Pegasus Account has been set-up to access the Direct Billing Services - Online Bill Access Application. By updating and submitting your request from this location, your VITA Pegasus Account will automatically provide access to the Direct Billing Services - Online Bill Access Application.

c) Update Your VITA Pegasus Account with Pegasus Profile Manager (including update your password)

This option is for users who already have a VITA Pegasus Account, and already have access to the Direct Billing Services - Online Bill Access Application.

From here you are able to update your contact information, change your secret security questions, and reset your password.

- Step 1:

  Select the *Update your VITA Pegasus Account* link from the Direct Billing Services - Online Bill Access Application Login Page.

  You are directed to the Pegasus Profile Manager page of the VITA Pegasus Account Application. See screen shot below:

- Step 2:

    Select the "Login" option.

    A window will pop-up requesting your Pegasus user name and password.
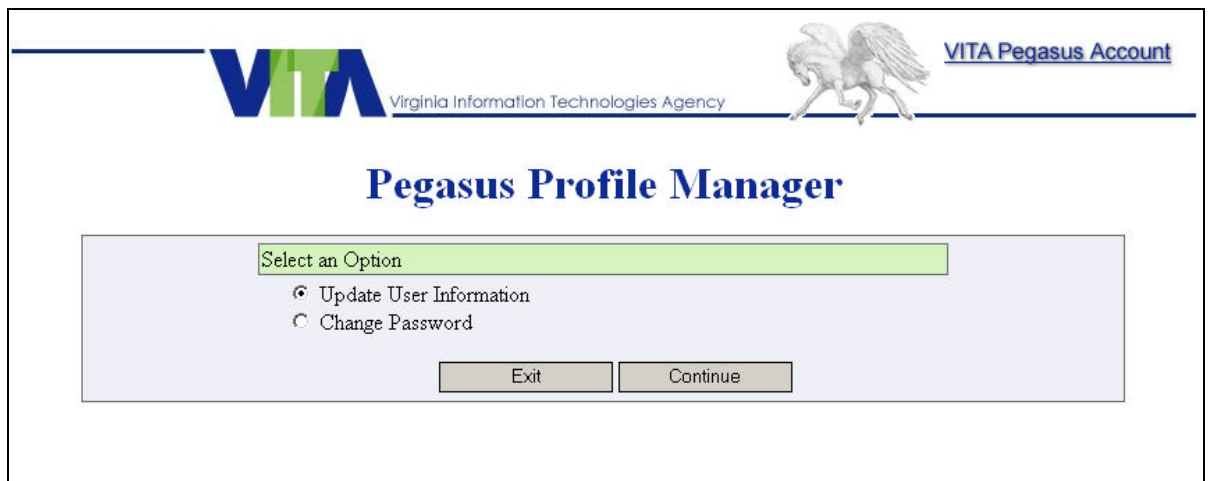
- Step 3:

    Enter your Pegasus user name and password and click "OK". This will log you into the VITA Pegasus Account Management Application.

    After completing the login, you are presented with the Pegasus Profile Manager screen. See screen shot below:

- Step 4:

    Select the "Update User Information" option and click the "Continue" button. You are directed to the "Update User Account Information" page.

1. Step 5:

   Enter any necessary changes to your profile data, enter your e-mail address in the "Confirm Email" field, and click the "Submit" button.

d) Forgot your VITA Pegasus Account Password? (or User Name)?

This option is for users who already have a VITA Pegasus Account and have access to the Direct Billing Services - Online Bill Access Application, but forgot their Account Password (or User Name).

- Step 1: Select the *Forgot your VITA Pegasus Account Password?(or User Name)?* link from the Direct Billing Services - Online Bill Access Application Login Page.

   You are presented with the "User Verification" screen. See screen shot below:

- Step 2: Enter your VITA Pegasus Account user name and select the "Continue" button.

   You will receive a message stating that your Verification Code will arrive by e-mail.

   Once you have received your Verification Number, you are ready to resume with Step 3.

- Step 3: You will receive an Email with your Pegasus Account Name, Your verification code. Follow the instructions given in the e-mail. See screen shot of the email below:

- Step 4: Please browse to https://xxx.vita.virginia.gov/xxxxxxx/xxxxxxx/forgot/step2.cfm (actual link sent in the e-mail) and supply the information.
  If you click on this link and receive an error, please copy the link and paste into you browser's address field

You are directed to "User Verification" screen. See screen shot below:

- Step 7: Enter the VITA Pegasus Account User name and the Verification code and then select the "Continue" button.
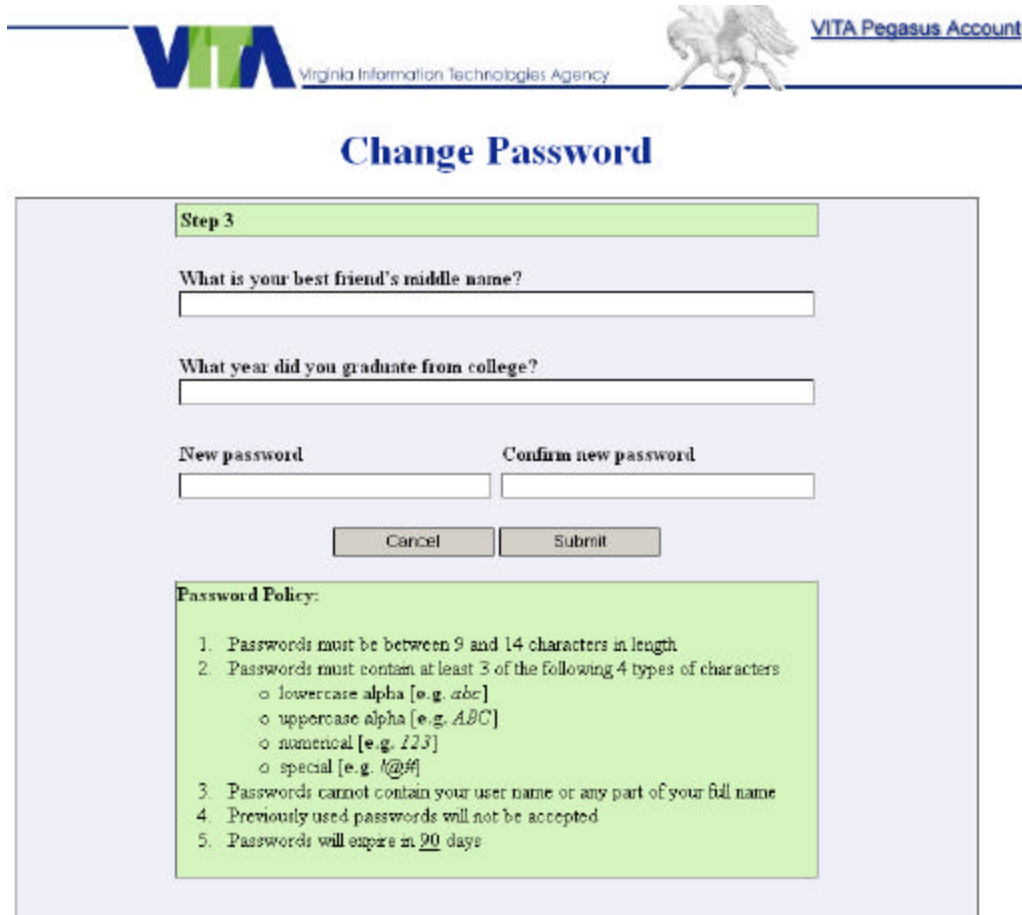
  After selecting the "Continue" button, you are presented with the "User Verification" screen. See screen shot below:

- Step 8: Enter your VITA Pegasus Account user name and enter the Verification Code you received in your e-mail, then select the "Continue" button.

You are directed to the "Change Password" screen.

- Step 9: Enter answers to your two secret security questions. You will need to create a new password and retype that password for confirmation. When you are finished, click the "Submit" button.

Please note, when creating a password, you must adhere to the following criteria:

- Passwords must be between 9 and 14 characters in length.

- Passwords must contain at least 3 of the following 4 types of characters.

    o lowercase alpha [e.g., abc]

    o uppercase alpha [e.g., ABC]

    o numerical [e.g., 123]

    o special [e.g., !@#]

- Passwords cannot contain your user name or any part of your full name.

- Passwords used previously will not be accepted.

- Passwords will expire in 90 days.

After clicking the "Submit" button, if you have correctly answered your two secret security questions and adhered to the password requirements, you will receive the following success window:

Click the **Return to Main Page** link in order to exit this window.

D. Direct Billing Services - Online Bill Access Application

In order to log into the Direct Billing Services - Online Bill Access Application, you must have already obtained a VITA Pegasus Account and received access to the Direct Billing Services - Online Bill Access Application.

- Step 1: Select the *Login to the Direct Billing Services - Online Bill Access Application* link. A window will pop-up requesting your Pegasus user name and password.

- Step 2: Enter your Pegasus user name and password and hit "Enter" key on your. This will log you into the Direct Billing Services - Online Bill Access Application. You are directed to the Direct Billing Services - Online Bill Access Application home page.

III. How to use Direct Billing Services - Online Bill Access Application – Bill Browser

Bill Browser screen will be displayed when users log on to the Direct Billing Services - Online Bill Access Application. Bill Browser screen is the home page of Direct Billing Services - Online Bill Access Application.

Bill Browser Screen - Home Page
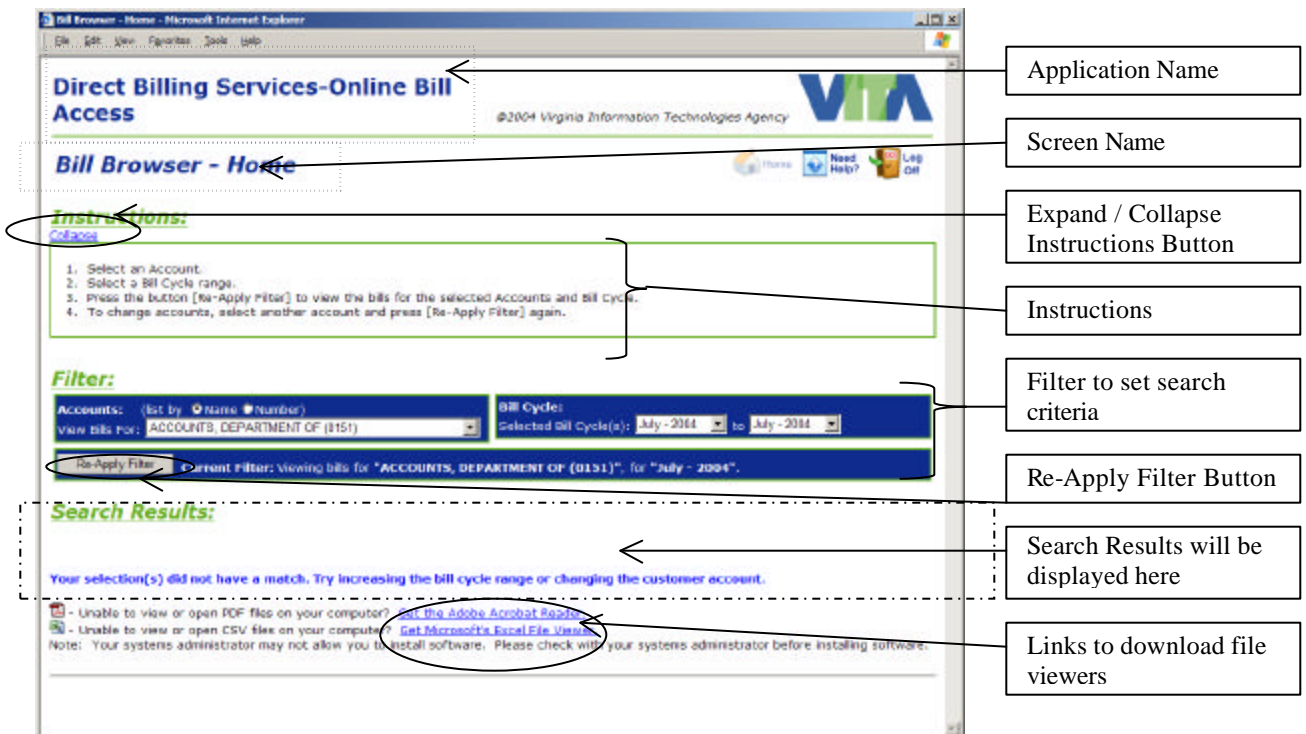
A. Screen Description

Bill Browser Screen is divided into 3 main sections:

a. The top portion of the Bill Browser Screen provides onscreen instruction on how to use the Bill Browser

    1. **Instructions**

- Online Instructions on how to use the Bill Browser.

- *Expand / Collapse* link.

    o Click on the *Expand* link to expand and view the instructions alternatively

    o Click on the *Collapse* link to hide the instructions.

b. The middle portion of the Bill Browser Screen displays the name of the agency / customer, whose data is being displayed, and a provision to select the Bill Cycle Dates.

1. **Filter**

- Filter allows the user to set a search criteria:

  o *Accounts* (Agency Name): Dropdown box with single agency / customer number is displayed. Only the agency / customer for which the user is given access is displayed in the Dropdown box

  o *Bill Cycle Date*: Two Dropdown boxes are provided to select a bill cycle range

  o *Re-apply filter* button is displayed

  Note: For users with access to multiple agencies / customers the dropdown box lists names of all the agencies / customers for which the user is given access. Users can select and search one agency's bills at a time.

2. **Search Results**

- Search results are displayed in a table with the following column headings:

    o View / Download Bill column

    o File Type

    o Bill Cycle

    o Bill Name

    o Invoice Date

- Bills per page: Select the number from the dropdown box to set the number of bills to be displayed in the search results table.

- Sort Search Results: Search results are sortable by

    o Bill Cycle

    o Bill Name

    o Invoice Date

c. Bottom portion:

1. **Tips and Helpful Links**

- Comments, Tips:

    o Comments and tips on Search results are provided for users references

- Download links:

    o Users who do not have Acrobat Reader and Microsoft Excel installed can access the download site using these links

        ▪ Get the Adobe Acrobat Reader.

        ▪ Get Microsoft's Excel File Viewer.

    o Links to download Adobe Acrobat Reader and Microsoft Excel file Viewer are also provided on Bill Browser Screen.

B. Using the Application's Functionality:

1. Set Search Filter

Users can select search criteria using the following options:

- **Accounts:** (list by ○ Name ◉ Number)

Users can select the radio button under the "Accounts list by" option to sort the agency / customer listing in the dropdown box either by agency name or by agency number

- **Agency / Customer Number**

Users can select the agency / customer using the dropdown box. Only the Agency / Customer number for which the user is given access is displayed in the dropdown box.

Note: For users with access to multiple agencies / customers, the dropdown box lists names of all the agencies / customers for which the user is given access.

User can select and search for one agency's bill at a time.

- **Bill Cycle Date**

Users can select Bill cycle date using the two dropdown boxes provided to select a bill cycle range.

By default the two dropdown boxes display latest bill cycle date.

- **Re-Apply Filter**

User can click on the "*Re-Apply Filter*" Button to apply the selected search criteria.

The current filter settings are displayed next to *Re-Apply Filter* Button for user's reference.

2. Display Search Results

Bills per Page

Users have the options to select the rows per page in which the Search results will be displayed.

Select a number (5, 10, 15, 20, 25, 30, and 50) from the dropdown box to set the number of rows per page to be displayed in the search results table.

Number of pages in which the complete search results are displayed is displayed on the lower left corner of the Search Results Table.

Bill Browser – Search Results Displayed

Search Results Table

Search results are displayed in a table with the following table headings

- **View / Download Bill column**

  View icon VIEW and Download icon DOWNLOAD are displayed on each row of the Search results.

  Click on View icon VIEW to open and view the file.

  Click on Download icon DOWNLOAD to download and save the file.

  Note: Behavior of these buttons may vary for non-standard web browsers.

- **File Type**

  Adobe PDF (.pdf) format files and Comma Delimited CSV (.csv) file are displayed by the Direct Billing Services - Online Bill Access Application and are available for users to view and/or download.

  Icon, icon in **File Type** column indicate the type of file displayed in the respective row.

  Icon will be displayed for an Adobe PDF (.pdf) file.

  Icon will be displayed for a Comma Delimited (.csv) file.

  Note: Access to Adobe PDF (.pdf) format files and Comma Delimited CSV (.csv) file depends on the user role and user privileges.

- **Bill Cycle**

  Bill Cycle column displays the Bill Cycle date and the Bill Period
  ID. Standard Billing Cycle and Special Billing Cycle are also
  identified for user reference.

  Bill Cycle is displayed in Month – Year – Bill Period ID format.
  Bill Period A is the Standard Bill cycle
  Bill Period B, C, etc are the Special Bill Cycles

  [i] Information icon is displayed next to the Bill Cycles label
  (Column heading). User can click on the icon to read more
  information on Bill Cycles.

  By default Search results are sorted on Bill Cycle date and are
  displayed in reverse chronological order.

- **Bill Name**

  Bill Name column displays the name of the bill or report that is
  referenced in that row.

  Depending on user roles the following bill names will be displayed:
      Direct Billing Services IAT (.pdf)
      IT Goods and Services Invoice Reports (.pdf)
      IT Goods and Services Invoice Data (.csv)
      IT Payroll Invoice Reports (.pdf)
      IT Payroll Invoice Data (.csv)

- **Invoice Date**

  Invoice Date column displays the Invoice Date. Invoice Detail
  Reports rows will display the same Invoice date as their respective
  IAT.

  Invoice Date on the IAT will match the Invoice Date displayed.

3. Sort Search Results

Users have the option to sort displayed search results. Search results can be sorted based on the following options:

Bill Cycle
Bill Name
Invoice Date

Note: Filter will be re-applied every time you sort the search results.

- Click on the *Bill Cycle* label to sort search results by Bill Cycle.

  Search Results will be sorted by Bill Cycle ID in the reverse chronological order (for example, September 2004, August 2004, July 2004, etc.). This is also the default search result sort.

- Click on the *Bill Name* label to sort search results by bill name.

  Search Results will be sorted by bill name. This sort will be helpful to list all Direct Bill IAT's, all IT Goods & Services Reports etc., together.

- Click on the *Invoice Date* label to sort search results by Invoice Date.

  Search Results will be sorted by Invoice Date in the reverse chronological order.

4. View and/or Download Direct Bill IAT, Invoice Detail Reports

The user has the option to view individual files (IAT or Invoice Details). Users will be able to access bills and reports that are displayed in the Search results table.

Depending on the user's role, the search results table on Bill Browser Screen will display the Direct Billing Services IAT in Adobe PDF (.pdf) format and Invoice Detail Reports in Adobe PDF (.pdf) format and Comma delimited (.csv) format.

Users can View and/or Download Direct Bill IAT, and Invoice Detail Reports.

Note: Behavior of these buttons may vary for non-standard web browsers.

View Files

- The user is required to specify the Search Criteria in one or more of the available Search Criteria fields and click on the *Re-Apply filter* to view the search results.

- Review the search results and identify the file (IAT or Invoice Detail Report) to view.

- Click on the *View* VIEW icon to view the respective file.

    (Users can also click on the row to view that particular file)

    a. If the associated file is a Adobe PDF (.pdf) file:

    - File will be displayed in a separate browser window.

        Note: If you are not able to open the file, Adobe Acrobat Reader is required to view an Adobe PDF (.pdf) format file. Link to download Adobe Acrobat Reader is available on the Bill Browser screen. Please check with your systems administrator before installing software.

    b. If the associated file is a Comma Delimited (.csv) file:

    - File Download window will appear. In this window the user will be able to select from the following options:

        - **Open**: to open the Software Data file and View the Data.

        - **Save**: to save the Software Data file.

        - **Cancel**: to cancel the file download action.

        - **More info**: to access more information (help) on file downloading.

File Download Window
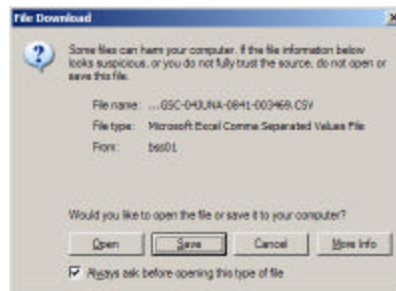
- Click on Open Button of the File Download window to open the file.

- File will be displayed in a separate browser window.

- The downloaded file will be in Excel (.xls) format.

  Note: If you are not able to open the file, Microsoft's Excel File Viewer is required to view a Comma Delimited (.csv) format file. Link to download Microsoft's Excel File Viewer is available on the Bill Browser screen. Please check with your systems administrator before installing software.

Other options

- Click on Save Button of the File Download window to save the file.

- Click on Cancel Button of the File Download window to cancel the View action.

Download and Save Files

- The user is required to specify the Search Criteria in one or more of the available Search Criteria fields and click on the *Re-Apply filter* to view the search results.

- Review the search results and identify the file (IAT or Invoice Detail Report) to download and save.

- Click on the Download DOWNLOAD icon to download the respective file.

- File Download window will appear. In this window the user will be able to select from the following options:

    - **Open**: to open the Software Data file and View the Data.

    - **Save**: to save the Software Data file.

    - **Cancel**: to cancel the file download action.

    - **More info**: to access more information (help) on file downloading.

- Click on Save Button on the File Download window to save the data file to the desired folder.

- Save As window will open. Navigate to the desired folder.

- Rename the download file.

- Save the file as an Excel (.xls) file.

Other options

- Click on Cancel Button of the File Download window to cancel the View action.

IV.   Help

- Click on the Help icon ![Need Help?] available on top right corner of each of the application screens to access the Direct Billing Services - Online Bill Access Application Help screen.

- Help Screen will appear. See screen shot below

HELP SCREEN

Link to access User Guide
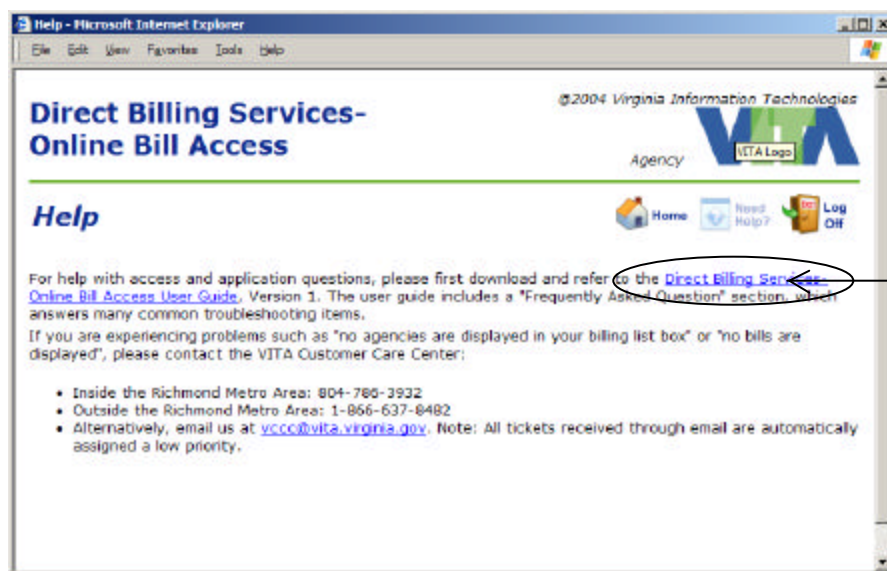
- Follow the instructions on the Help page to access additional help resources on Direct Billing Services - Online Bill Access Application.

A. FAQ's

Q1:   I am able to see only bills for Agency number 00XXX.

A: Access to Direct Billing Services - Online Bill Access application is restricted. User can only view bills of agencies for which they have been given access.

Q2:   No bills present for a Billing Cycle?

A: Following message will be displayed "Your selection(s) did not have a match. Try increasing the bill cycle range or changing the customer account". Invoices for any billing cycle are generated only if there are any billable transactions during that billing period.

Q: I don't get an e-mail regularly?

A: E-mails are sent to a Billing Contact (Bill Receiver and Bill Reviewer) only if an invoice is generated for a particular billing cycle. You will not receive an e-mail if there is no invoice for your agency in a particular billing cycle.

Q: Only Adobe PDF (.pdf) files are displayed.

A: User access to bills and reports is based on user role.

Bill Receivers have access to Direct Bill IAT's in Adobe PDF (.pdf) file format and to Invoice Detail Reports in Adobe PDF (.pdf) file format and Comma delimited (.csv) file format.

Bill Reviewers have access to Direct Bill IAT's and Invoice Detail Reports in Adobe PDF (.pdf) file format only. Invoice Detail Reports in Comma delimited (.csv) file format are not available for Bill Reviewers.

Q: I am unable to view Adobe PDF (.pdf) files on your computer?

A: Adobe Acrobat reader is required for view the Adobe PDF (.pdf) file. Links to download Adobe Acrobat reader are provided on Bill Browser Screen.

Q: I am unable to view or open CSV files on your computer?

A: Microsoft's Excel File Viewer is required to view comma delimited (.csv) files. Links to download Microsoft's Excel File Viewer are provided on Bill Browser Screen.

Q: What are CSV files?

A: A comma-separated values file, known as a CSV file, is a type of data format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

For example, data pulled from a database and represented in comma-delimited format looks something like the following. Each column value is separated by a comma from the next column's value and each row starts a new line. (Source: www.pcwebopedia.com)

Q: I don't see Invoice Detail Reports for my Direct Bill IAT for the May month bill cycle.

A: Invoice Detail reports are generated for all the line items on the Direct Bill IAT. Invoice Detail reports are generated only for the line items present on the Direct Bill IAT, giving detail supporting information for each line item on the Direct Bill IAT. Invoice Detail reports are not generated for Adjustment entries (emergency credits and debits)

Q: We have procured IT Goods and Services and the item is not shown on the IAT?

A: Customers will be invoiced only after the payment is made by VITA to the vendors.

Q: Descriptions on Invoice Detail Reports are wrong?

A: Direct Billing application utilizes the eVa data entered by the customers, and the descriptions on Invoice Detail Reports are the same as entered by the customers. Please verify the same with your procurement department.

Q: Do I have to have a Pegasus account to access the Direct Billing Services – Online Bill Access Application?

A: Yes, a Pegasus account is required to access the Direct Billing Services – Online Bill Access Application. Details to get Pegasus user ID and password are provided on page 9 of this user guide.

Q: We want to add a new billing contact (Bill receiver / Bill Reviewer)?

A: Adding or changing a billing contact can be done using the Direct Billing Services Contact Maintenance From. Use the submit button at the bottom of the form to e-mail the request to VITA Billing Department. (Email address: Billing@vita.virginia.gov).

Q: Where can find the Billing Contact Maintenance From?
A: Billing Contact Maintenance From can be accessed online @ http://www.vita.virginia.gov/misforms/forms/vitadbs_bcc.cfm

Q: Whom should I contact regarding technical issues like:

- Can't get access to Direct Billing Services – Online Bill Access Application.

- Password is not working.

- Bill don't display, unable to open bills

A: For all technical issues please contact the VITA Customer Care Center:

- Inside the Richmond Metro Area: 804-786-3932

- Outside the Richmond Metro Area: 1-866-637-8482

- Alternatively, email us at vccc@vita.virginia.gov. Note: All tickets received through email are automatically assigned a low priority.

Q: Whom should I contact regarding Business / Billing Detail issues like:

- Wrong agency shows up

- PO shows up; didn't order. Application uses eVA. First verify within eVA and with agency personnel that order did not originate from agency.

- Questions on payroll information, IT Goods and Services information, etc.?

A: For all Business / Billing Detail issues please contact the VITA Customer Care Center:

- Inside the Richmond Metro Area: 804-786-3932

- Outside the Richmond Metro Area: 1-866-637-8482

- Alternatively, email us at vccc@vita.virginia.gov. Note: All tickets received through email are automatically assigned a low priority

Q: Why are our purchases not reflected in the current month IAT's?

A: Agencies will be billed only after the payment is made by VITA to the vendors.

Vendor payments are made after verifying the purchase order, vendor invoice and the agency receiver. A three way match is required in VITA's financial system to release the vendor payment.

V. Log Out

- Click on the Log Off icon [Log Off icon] available on top right corner of each of the application screens to access the Log Out screen and to log out of the Direct Billing Services - Online Bill Access Application.
- Log Out Screen will appear. See screen shot below.

LOG OUT SCREEN

Continue to Log off - Link
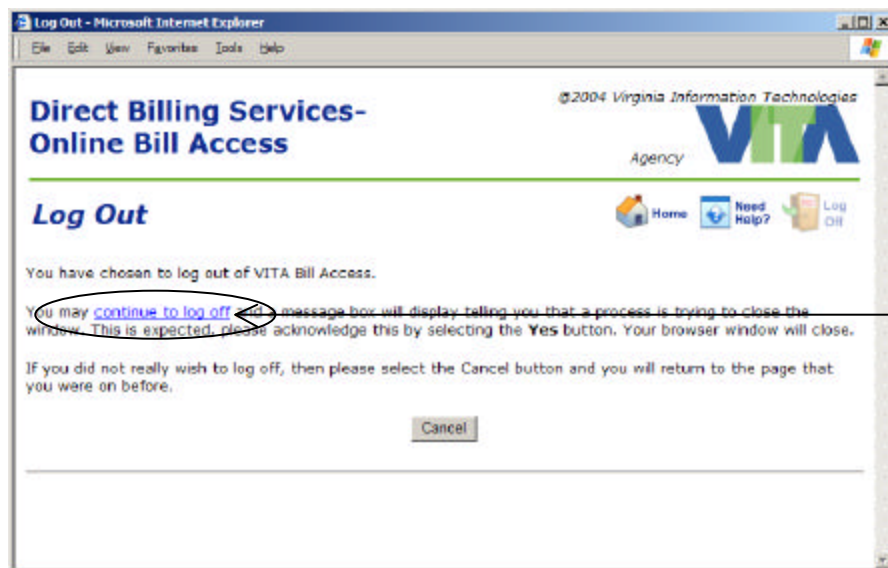
- Follow the instructions on the Log Out page to Log Out of the Direct Billing Services - Online Bill Access Application.
- Click on continue to log off link to continue the Log Off process.

  A message box will be displayed with the following message

  "The web page you are viewing is trying to close the window. Do you want to close the window?"
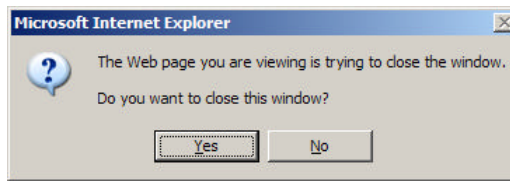
- Click on Yes to log off from the Direct Billing Services - Online Bill Access Application

- Click on No to remain on the Log Off page of the Direct Billing Services - Online Bill Access Application

- If you did not wish to log off, click on the Cancel button and you will return to the previous page that you were on before.

VI. Appendix

A. Appendix - 1

---------- To Be Included ----------